**Financial Goals Worksheet**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Short-Term Goals  (Under 12 months) | Estimated Cost | | Target Date | | Amount to Save Monthly |
|  |  | $ | $ | | |
|  |  | $ | | $ | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  |  | TOTAL to Save: $ | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Medium-Term Goals  (One to three years) | Estimated Cost | | Target Date | | Amount to Save Monthly |
|  |  | $ | $ | | |
|  |  | $ | | $ | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  |  | TOTAL to Save: $ | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Long- Term Goals  (Over three years) | Estimated Cost | | Target Date | | Amount to Save Monthly |
|  |  | $ | $ | | |
|  |  | $ | | $ | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  | $ | $ | | |
|  |  |  | TOTAL to Save: $ | | |